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ANALYST & STRATEGIST

**EASTERN
SIERRA
REGION**

VISITOR CONNECTION STRATEGY

Photo: Simpson

20/21



**SUSTAINABLE
RECREATION
& TOURISM
INITIATIVE**

Funded by a grant from Proposition 68
and the Sierra Nevada Conservancy



essrp.org

Visitor Connection Strategy

Eastern Sierra Sustainable Recreation and Tourism Initiative

SMGConsulting
TAKE ANOTHER PATH.

December 2021

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Grant Acknowledgment

Funding for this project has been provided by the Sierra Nevada Conservancy, an agency of the State of California, under the California Drought, Water, Parks, Climate, Coastal Protection, and Outdoor Access For All Act of 2018 (Proposition 68) and in support of the Sierra Nevada Watershed Improvement Program.

Land Acknowledgment

Public lands in the United States hold the creation stories, burial grounds, and ceremonies of Indigenous people who were killed or forcibly removed from their ancestral homes during territorial acquisition.

Many tribes, comprised of different bands, continue to live in the Eastern Sierra region, caring for their native lands as they coexist with the ongoing impacts of colonization. Past or present tribes and bands associated with the region that this effort is aware of include, but are not limited to, the Miwok, Mono Lake Kutzadika'a, Mono/Monache, Nüümü (Paiute), Newe (Shoshone), Timbisha, Utu Utu Gwaitu Paiute, and Washoe.

Two Nüümü terms describe the region and provide important context to ideas offered in this initiative. The first is Pamidu Toiyabe (Western Mountains), and the other, more widely known, place name is Payahuunadü (The Place Where Water Flows).

This acknowledgment is an invitation to all organizations, residents, and visitors to recognize the way this history has shaped the present as all parties work together in anticipation of a better future.

Project Overview

The Sustainable Recreation & Tourism Initiative

In spring 2019, the Sierra Nevada Conservancy's Governing Board demonstrated a pioneering commitment to rural California's outdoor recreation economy and natural resources by authorizing Proposition 68 funding for the Sustainable Recreation & Tourism Initiative, a project to benefit the Conservancy's East Subregion, including Inyo, Mono, and Alpine Counties.

The Initiative supports the Eastern Sierra Sustainable Recreation Partnership in its goals to "design, plan, implement, and report out projects to improve and maintain recreational opportunities as well as restore ecosystems to their natural resiliency and functions." The initiative comprises four tracks, or areas of focus, with specific deliverables: Regional Recreation Stakeholder Engagement; Climate Adaptation & Resilience Assessment; Connection to the Eastern Sierra Visitor Audience; and Project Development & Prioritization for Funding.

Funding for this project has been provided by the Sierra Nevada Conservancy, an agency of the State of California, under the California Drought, Water, Parks, Climate, Coastal Protection, and Outdoor Access For All Act of 2018 (Proposition 68) and in support of the Sierra Nevada Watershed Improvement Program.

For more information: mltpa.org/essrp/sustainable-recreation-and-tourism-project

About the “Connection to the Eastern Sierra Visitor” Track

In spring 2019, the Sierra Nevada Conservancy awarded a grant to the region for the Sustainable Recreation & Tourism Initiative, to include a deliverable titled “Connection to the Visitor Audience.” Later that same year, the Visitor Connection Working Group was established, comprising 28 representatives of regional organizations with a vast and diverse range of expertise in engaging with the visitor audience, from destination marketing organizations to recreation user groups.

Convened in a series of workshops over 14 months and charged with identifying communications-program components to articulate a unified voice for the Eastern Sierra rooted in sustainable recreation and stewardship, the Visitor Connection Working Group created the Visitor Connection Package. This document is a comprehensive strategy, including implementation steps.

About the Visitor Connection Working Group

From destination marketers to recreation user groups, this document captures the input and thought leadership of 28 organizations with expertise in engaging with the region’s visitor audience. Carl Ribaudo of SMG Consulting developed the strategic framework and provided facilitation services over a 14-month process to create this Visitor Connection Package.

The Sustainable Recreation & Tourism Initiative is grateful for the contributions and participation of the following:

Alabama Hills Stewardship Group, Kathy Bancroft
 Alpine County, David Griffith
 Alpine County Chamber of Commerce, Mark Schwartz
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 Bishop Chamber of Commerce & Visitors Bureau, Tawni Thomson & Julie Faber
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 Eastern Sierra Interpretive Association, Jeff Gabriel
 Friends of the Inyo, Alex Ertaud & Wendy Schneider
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Humboldt-Toiyabe National Forest, Jan Cutts & Erica Hupp
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 Mammoth Lakes Recreation, Kim Anaclerio, Matt McClain & Matt Paruolo
 Mammoth Lakes Tourism, Matt Gebo
 Mammoth Resorts (Mammoth Mountain), Joani Lynch
 Mono County, Alicia Vennos
 Mono Lake Committee, Geoff McQuilkin & Claire Landowski
 National Park Service, Bernadette Johnson
 Pacific Crest Trail Association, Ben Barry
 Town of Mammoth Lakes, Stuart Brown

The Eastern Sierra Sustainable Recreation Partnership

The Eastern Sierra Sustainable Recreation Partnership (ESSRP) is a unique public/public partnership among Eastern Sierra governments, state agencies, and federal agencies.

Participating agencies include Alpine County; the City of Bishop; the Bureau of Land Management; Caltrans District 9; Inyo County; the Town of Mammoth Lakes; Mono County; the National Park Service; Inyo National Forest, Pacific Southwest Region (USFS Region 5); and Humboldt-Toiyabe National Forest, Intermountain Region (USFS Region 4).

About the Consultants

SMG Consulting: Carl Ribaudo is the president and chief strategist for SMG Consulting, a tourism and recreation consulting firm located in South Lake Tahoe, California. The firm specializes in cooperative approaches to tourism challenges and opportunities.

SMG provided various services, including meeting content development, research, facilitation, and strategic direction.

www.smgonline.net

Mammoth Lakes Trails & Public Access Foundation: The Mammoth Lakes Trails & Public Access Foundation (MLTPA) is a 501(c)3 non-profit organization incorporated in 2007 as a public benefit corporation in the State of California. MLTPA has been engaged with local and regional issues of sustainable recreation and collaboration in California's Eastern Sierra since its inception and provides technical support to a regional public/public recreation-based solution, the Eastern Sierra Sustainable Recreation Partnership.

MLTPA provided various services for this process, including grant and project management, meeting content development, research, meeting convening, public and participant communications, and document production.

www.mltpa.org

Executive Summary

The Visitor Connection Strategy represents a timely and needed response to a changing marketplace marked by a significant increase in visitation and outdoor recreation participation in the Eastern Sierra.

This strategy focuses on developing a forward-looking sustainable approach to recreation in the Eastern Sierra that will accommodate predicted increases in visitation and mitigate impacts to natural resources.

The Need for the Strategy

This need is a result of several primary factors, including the following:

The Impact of the COVID-19 Pandemic

2020 saw the emergence of a new coronavirus and its resulting respiratory illness, COVID-19, which dramatically changed visitation behavior throughout the Eastern Sierra. Many California residents increased the demand for outdoor recreation locations away from dense urban populations, increasing the impact on natural resources.

California Population Growth

One of the most impactful forces of change is the growth of the California population, reaching approximately 40 million and concentrating in centers near and accessible to tourism destinations like the Eastern Sierra.

Strong Economic Growth

Another dynamic impacting peak travel is the strong economy, which has been positive since the recession. Moving into a third year of COVID-19 has been generally positive, which has enabled more consumers to travel.

Tourism Funding

Another driving force impacting peak travel has been the dramatic increase in tourism promotion funding made available by the creation of Tourism Business Improvement Districts (TBIDs), generating more than \$250 million in tourism promotion funding in California.

The Partnership

The working group, assembled from a cross-section of public and private organizations throughout the Eastern Sierra, developed a set of guiding principles that focus on stewardship, education, and the celebration of local culture and do not compete with existing efforts within the region.

The Strategy Framework, Opportunity, and Supporting Organizational Assets

The Visitor Connection Strategy framework consists of three elements: understanding the current opportunity, creating a strategy, and transforming the created strategy into implementation steps leading to on-the-ground achievements.

While the COVID-19 pandemic has significantly impacted the region, it also created an opportunity to craft a regional approach with a working partnership and collaboration among partners. This

partnership focused on changing visitor mindsets, educating visitors, and creating sustainability with visitors and the natural environment. The problems and opportunities serve as a basis for developing and guiding the Visitor Connection Strategy.

The strategy seeks to take advantage of a wealth of organizational assets that already exist and can be used to assist in promoting appropriate stewardship messaging. These assets are varied and include the following:

- 8 million direct in-person interactions with the public per year
- 31 million webpage views per year
- 1.2 million Facebook followers
- 650,000 Instagram followers
- 194,000 Twitter followers
- 54,000 Pinterest followers
- 637,000 email newsletter subscribers
- 34,000 print newsletter subscribers

Together with partners' assets and organizational support, these tools can be integrated to provide a focused Visitor Connection Strategy with desired stewardship messaging.

Eastern Sierra Messaging Objectives and Strategy

The Eastern Sierra messaging objectives are designed to maximize the opportunities that have been identified previously. They include the following:

1. Support organizations' existing stewardship messages.
2. Leverage the power of Eastern Sierra marketing channels.
3. Leverage the financial resources of the Eastern Sierra for message reach.
4. Create awareness for the Eastern Sierra stewardship message.
5. Educate potential visitors on stewardship practices.
6. Measure the effectiveness of messaging efforts.

The messaging strategy comprises two elements: to use the partnership's existing tools to reach potential visitors, and to support partner message outreach and create a unified message and resource for the region. The purpose of the strategy is to support the partner organization and not compete with them.

Implementation

Implementation of the strategy includes three phases. Each phase is designed to build upon the previous phase. The implementation starts with capacity building to support the strategy and builds on each previous phase to full implementation.

The organizational structure includes two essential elements where the Visitor Connection Package fits in the mix of regional organizations and how the effort will be organized to operate and implement programs.

To execute the strategy, there is a need to develop a phased budget for implementation with commitments from the membership to a sustained funding level. The funding model calls for a tiered approach to allow partners to support the effort with different levels of funding.

Section 1: The Eastern Sierra

A. Snapshot Overview

The Eastern Sierra is the nation's ecological and geological crown jewel. Sprawling from desert valleys to high peaks, the landscape is enriched by communities imbued with cultural, historical, natural, and recreational opportunities second to none.

Located in the east-central section of California, the Eastern Sierra landscape is rough and spectacular. It is one of California's most remote and rural locations. The region is approximately 250 miles from Alpine County to the north to Inyo County to the south. The region's average width is 38 miles from the Sierra Nevada mountain range west to the Nevada state line on the east. Mountainous wilderness abounds on the western side of the region, while communities line the central corridor along Highway 395, and desert adventures play out to the east.

The economy is rural and highly tourism-dependent. The region has developed as a tourism destination based on its surrounding natural assets and land-ownership limitations. Currently, tourism is the region's largest employer, supporting economic sectors including professional services, government, military, and, to a much lesser degree, ranching and agriculture.

The overall population of the counties of the Eastern Sierra is 33,702.



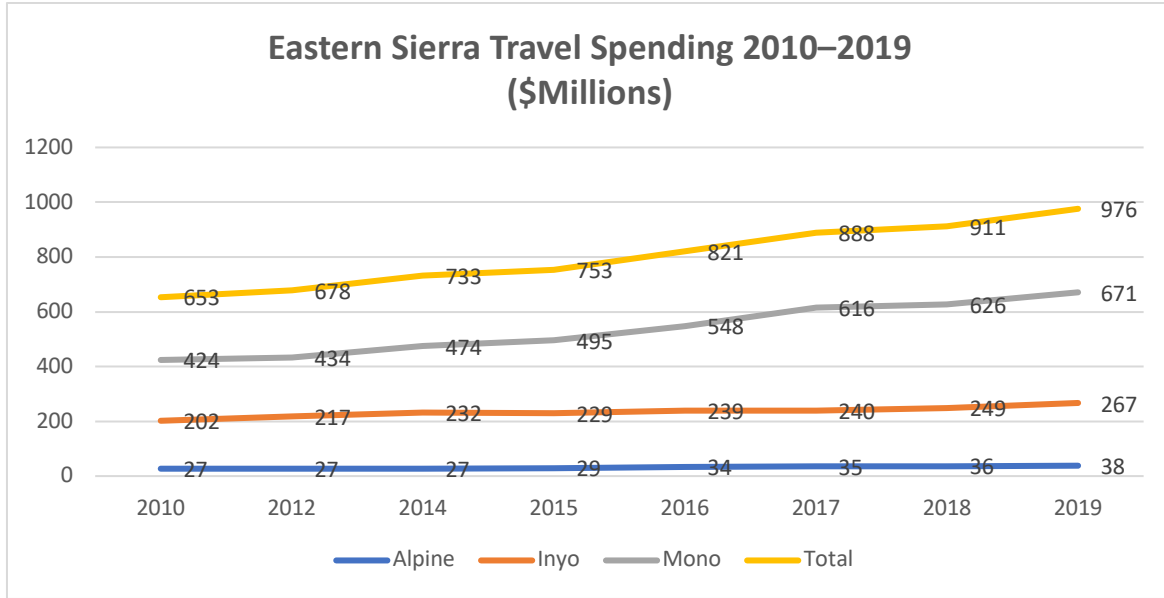


B. The Eastern Sierra Tourism Economy

Among the three counties, tourism generates approximately \$1 billion in travel spending, 9,200 jobs, and \$54 million in local taxes per year. As such, proactive management of the tourism industry is critical for residents and local government.

1. Travel Spending

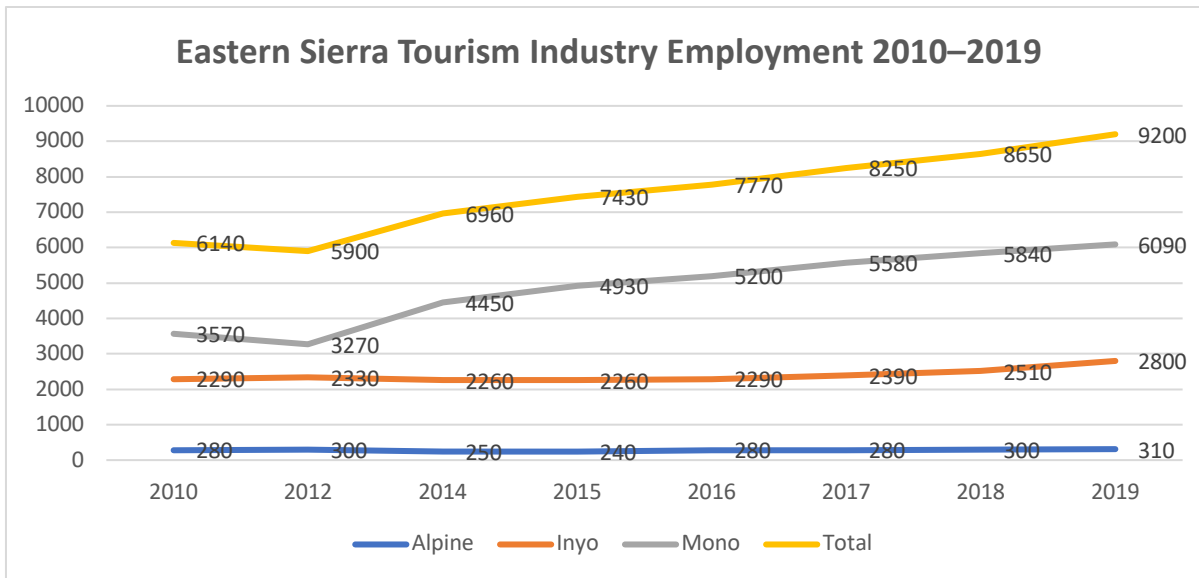
The tourism economy has seen significant growth between 2010 and 2019. Travel spending rose from \$653 million to \$976 million, an increase of 49%. This increase is in large part a result of a strong national and state economy as well as an increase in tourism marketing efforts.



California Travel Impacts by County 2010–2019, SMG Consulting

2. Employment

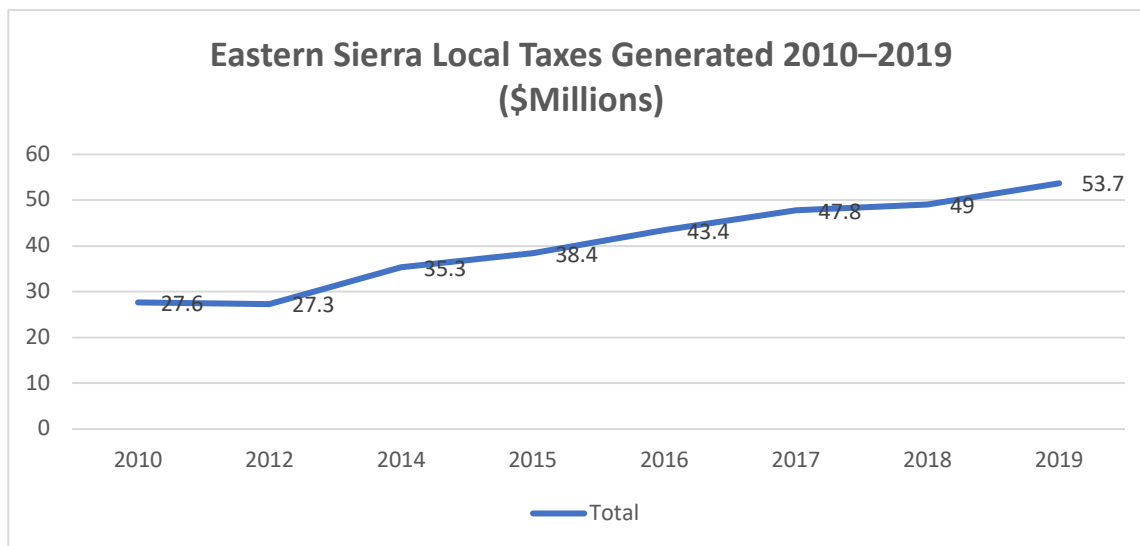
Tourism and travel spending generate approximately 9,200 jobs in the Eastern Sierra. The job-growth trend has kept pace with travel spending.



California Travel Impacts by County 2010–2019, SMG Consulting

3. Local Taxes

Combined Eastern Sierra visitors and tourism-related businesses generate approximately \$53.7 million in local taxes annually.



California Travel Impacts by County 2010–2019, SMG Consulting

Travel spending in the region has not only increased in each of the counties over the last 10 years, but has also shifted within the region, **with Mono County seeing an increase in its share of visitor spending.**

2010 vs. 2019 Eastern Sierra Regional Travel Spending

County	2010 Spending (\$ Millions)	%	2019 Spending (\$ Millions)	%
Inyo	\$202.0	30.93%	\$267.0	27.4%
Alpine	\$27.0	4.13%	\$38.0	3.9%
Mono	\$424.0	64.93%	\$671.0	68.8%
Total	\$653.0	100.00%	\$976.0	100.00%

Source: California Travel Impacts by County 2010–2019, SMG Consulting

There can be no doubt about the importance of tourism to the economy of the Eastern Sierra. A key concern over the long term is maintaining a sustainable approach between visitation and the impact on the natural resources and the region's local culture.

Section 2: The Eastern Sierra: The Place

A. Transportation Access

The Eastern Sierra is accessed from the north and south from U.S. Highway 395 and from the east and west along several state highways. The region is also served by several general aviation airports and the Mammoth-Yosemite commercial airport in Mammoth Lakes. The Bishop Airport began commercial service in December 2021, which will reduce the impact of bad-weather closures at the Mammoth-Yosemite Airport which created unreliable air transit.

The ultra-scenic Highway 395 is the Eastern Sierra's north-south transportation artery through the entire region (approximately 250 miles). Many sections are currently designated as a Scenic Route by the State of California, and many visitors are drawn to the region for scenic drives.

From an economic development and tourism perspective, the importance of Highway 395 cannot be overstated. The highway provides access to the Eastern Sierra and its local communities and connects to the recreational, historical, and geographic assets located throughout the region.

B. Intrinsic Qualities of the Eastern Sierra

Along the Highway 395 corridor through the Eastern Sierra, various intrinsic qualities (qualities a visitor feels when experiencing the region) exist and overlap, including cultural, historical, natural, recreational, and scenic qualities. Some examples include:

- Yosemite National Park: Highway 395 is the only Eastern Sierra highway to access Yosemite National Park, via Highway 120.
- Death Valley National Park: Highway 395 and State Routes 168 and 190 provide highway access to Death Valley National Park.
- Mono Lake: A world-renowned site for wildlife viewing, Mono Lake is an alkaline body of water along Highway 395 with natural tufa towers emerging from the water.
- The Alabama Hills: A scenic icon offering a variety of outdoor recreation opportunities, including hiking, camping, scenic drives, rock climbing, biking, horseback riding, and photography.
- Mount Whitney: The highest peak in the contiguous United States, at 14,505 feet.
- Mammoth Mountain Ski Area: One of North America's largest ski areas, offering alpine and Nordic skiing, snowboarding, and mountain biking.
- Mono Lake Vista Point at Conway Summit: Offers far-reaching views of the Mono Basin.
- Benton's West Portal View: Provides travelers a view of the Sierra Nevada range.
- Tioga Pass: Offers a panoramic view of the Mono Basin from the east entry of Yosemite National Park.
- Trails in the Eastern Sierra include winter and summer routes for motorized and non-motorized experiences, including hiking, mountain biking, skiing, snowmobiling, and motorcycle riding.
- Fishing in the Eastern Sierra provides a wide variety of opportunities for both fly and spin enthusiasts, including along world-class Blue Ribbon Waters.

C. The Eastern Sierra Experience Profile

The Eastern Sierra experience profile consists of four core elements: Scenic Beauty, Local Communities & Culture, Recreation, and Environment & Stewardship.



Diverse offerings within the region characterize the Eastern Sierra. It offers visitors and residents a wide variety of activities, culture, scenic beauty, and environment that together provide a unique opportunity that can be appreciated only by experiencing it. The following is an overview of this profile:

Scenic Beauty: The Highway 395 corridor provides visitors with some of the country's most incredible scenery. Whether the view is overlooking Mono Lake or the Sierra Nevada range at sunrise, locations from Inyo County to Alpine County offer visitors an opportunity not just to view and experience the region's natural beauty, but also to connect with the greater natural environment.

Local Communities & Culture: The Eastern Sierra provides travelers and visitors an opportunity to experience the local communities and their culture. Local communities offer various recreation, special events, arts, and cultural opportunities that differentiate one community from the next.

Recreation: The Eastern Sierra provides travelers and visitors with a variety of year-round recreational opportunities. No matter the season, the activity, or the skill level, the region enables participants to engage and recreate as they like in one of the country's most beautiful places. Visitors enjoy world-class hiking, horseback riding, rock climbing, wildlife viewing, fishing, skiing, and camping.

Environment & Stewardship: The Eastern Sierra provides an opportunity to educate visitors about the environment and their role in the stewardship and protection of the area's natural resources. Only through exposure to these resources can visitors gain the needed perspective on managing and protecting them. The region provides a unique opportunity to educate people and foster an intrinsic understanding to enjoy and protect the resources. The Visitor Connection Package targets this opportunity to communicate the importance of the environment and stewardship, along with the need for a sustainable approach to tourism and outdoor recreation, while visitors enjoy the awe-inspiring Sierra.

D. The Eastern Sierra Visitor Activity Participation

While no comprehensive visitor data for Inyo, Mono, and Alpine counties is available, the 2018 Mono County Profile of Mono Visitors & Economic Impact of Tourism shows that visitors participate in a wide variety of year-round outdoor recreation activities on both land and water.

Based on Mono County research information (collected before the COVID-19 pandemic), visitors participate in a wide variety of outdoor recreation activities year-round, both land- and water-based.

All Outdoor Activity Participation (Main Activity and Other Activity Combined)

	Total Visitor	Season				Annual Total							
		Winter	Spring	Summer	Fall	Residence			Activities		MC Lodging		
						CA	Other U.S.	Int'l	Hike	Fish	Hot/Mot/ Inn	Other paid	Camping
Base: Outdoor activities	553	155	123	139	136	363	132	58	298	199	143	159	118
Hiking	57.2%	21.1%	55.3%	79.8%	64.1%	56.4%	50.6%	78.0%	100.0%	55.4%	52.1%	54.2%	64.7%
Fishing	40.4%	3.5%	58.4%	46.9%	45.3%	49.1%	29.6%	3.8%	39.1%	100.0%	36.7%	45.9%	57.3%
Camping	21.4%	1.8%	18.9%	29.5%	31.8%	19.1%	32.4%	12.6%	27.6%	25.4%	9.3%	5.6%	54.2%
Photography	20.1%	13.3%	11.3%	16.9%	40.3%	19.0%	21.3%	25.1%	27.3%	16.2%	30.9%	12.7%	30.4%
Alpine Skiing - downhill	13.6%	51.8%	9.5%	0.2%	0.0%	14.8%	11.1%	10.3%	7.8%	3.0%	10.4%	22.0%	3.7%
Hot Springs	12.2%	9.8%	10.7%	15.6%	12.0%	12.7%	11.6%	10.5%	14.9%	13.7%	10.9%	9.5%	19.4%
Boating	10.1%	0.0%	22.1%	13.3%	1.7%	12.6%	4.9%	4.8%	12.7%	20.9%	2.9%	18.8%	11.5%
Activities with my/our dog	8.4%	1.8%	10.0%	10.9%	9.3%	8.8%	9.5%	2.7%	10.4%	14.2%	3.5%	7.3%	11.0%
Kayaking	7.2%	0.3%	5.7%	17.6%	2.2%	9.3%	4.0%	0.0%	11.8%	10.9%	2.7%	5.9%	13.4%
Snowboarding	7.1%	30.6%	2.4%	0.0%	0.0%	8.4%	5.8%	1.1%	2.8%	0.8%	4.3%	16.4%	1.3%
Mountain biking/racing	5.5%	0.5%	5.1%	8.5%	7.0%	5.9%	6.2%	1.6%	7.6%	10.2%	5.6%	5.9%	6.5%
Rock-climbing	5.2%	1.5%	7.6%	5.3%	5.8%	3.9%	10.9%	1.1%	8.1%	4.1%	2.9%	0.5%	11.3%
Off-road motor sports	4.9%	2.2%	7.3%	2.4%	7.9%	4.7%	6.6%	2.7%	2.8%	4.5%	5.9%	3.7%	3.1%
Bicycle riding/road cycling	4.6%	0.0%	4.6%	8.4%	4.1%	5.9%	2.2%	1.1%	6.4%	6.7%	4.0%	8.0%	1.6%
Nordic Skiing - cross-country/skating	4.3%	19.0%	0.6%	0.4%	0.0%	3.5%	8.7%	0.0%	2.2%	0.0%	1.9%	5.8%	1.0%
Bird watching	4.2%	0.5%	3.1%	4.2%	8.9%	5.2%	1.7%	2.8%	6.4%	5.8%	5.9%	1.5%	5.8%

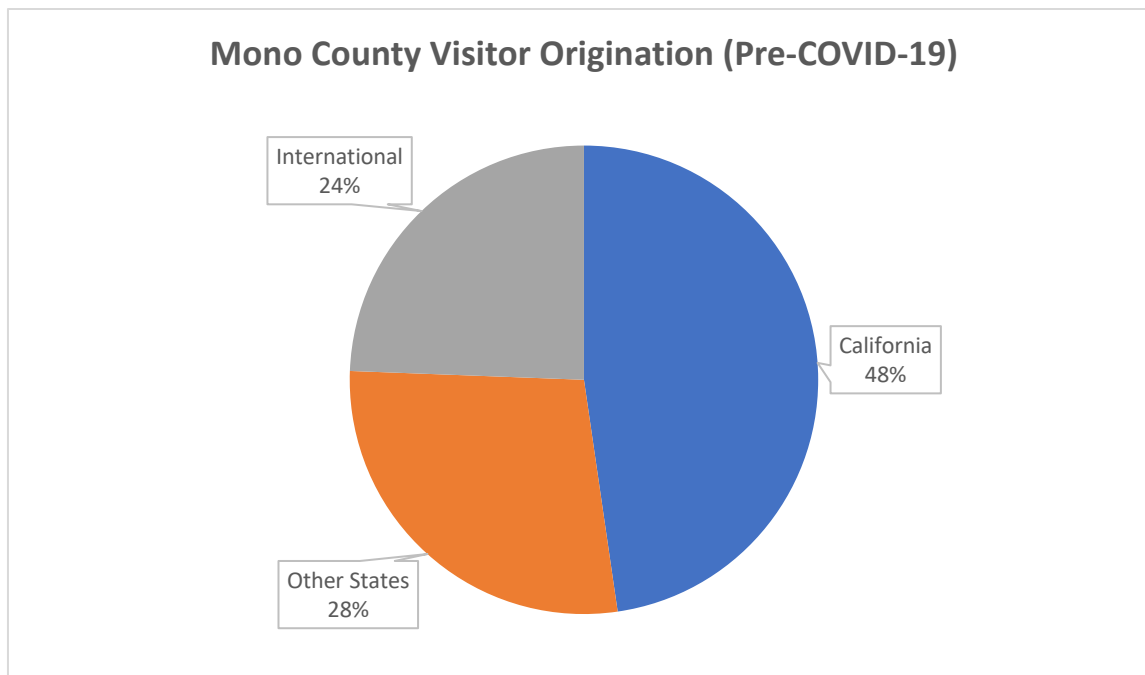
Source: Mono County, Profile of Mono Visitors & Economic Impact of Tourism, 2018

Section 3: Peak Tourism and the Eastern Sierra: How Did We Get Here?

This strategy focuses on developing a forward-looking, sustainable approach to recreation in the Eastern Sierra that will accommodate predicted increases in visitation and mitigate impacts to natural resources. For that reason, it is essential to step back and consider the changing dynamics of travel and “peak tourism” in California.

A. About the California Tourism Market

California residents include three major population markets, known as the “Core California Market,” composed of Southern California, Central California, and Northern California. In 2018, these markets, combined, totaled approximately 27 million residents. The Eastern Sierra’s primary market originates from Southern California and accounts for 18 million residents. Overall, California has approximately 40 million residents, with the population projected to increase over the next 10 to 20 years. Additionally, the Eastern Sierra attracts visitors to a lesser degree from the Central Valley and Northern California, and, given airline access, attracts international visitors through the Los Angeles and Las Vegas airports.

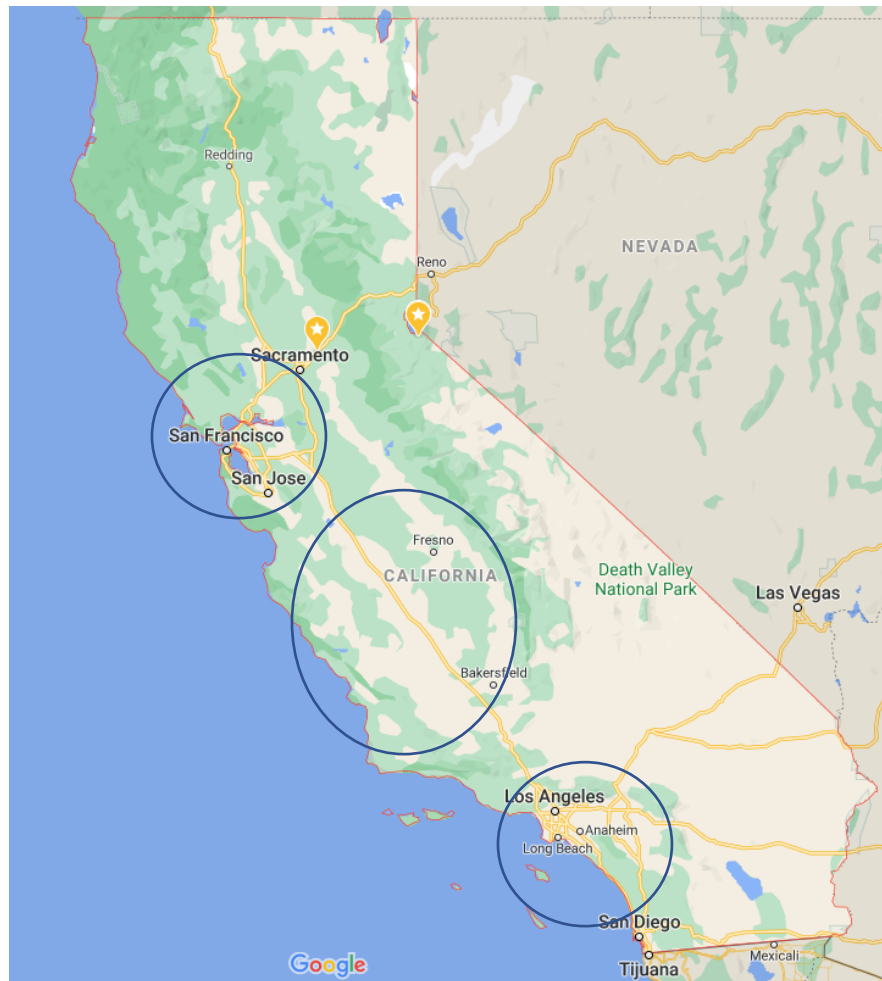


Source: Mono County, Profile of Mono Visitors & Economic Impact of Tourism, 2018

According to the same Mono County study, within California the primary source of visitation is from Southern California (61.6%), followed by Northern California (21.1%) and Central California (17.2%).

The Southern California market area is a crucial feeder market to the Eastern Sierra and drives the Eastern Sierra's tourism economy.

Primary Market Areas



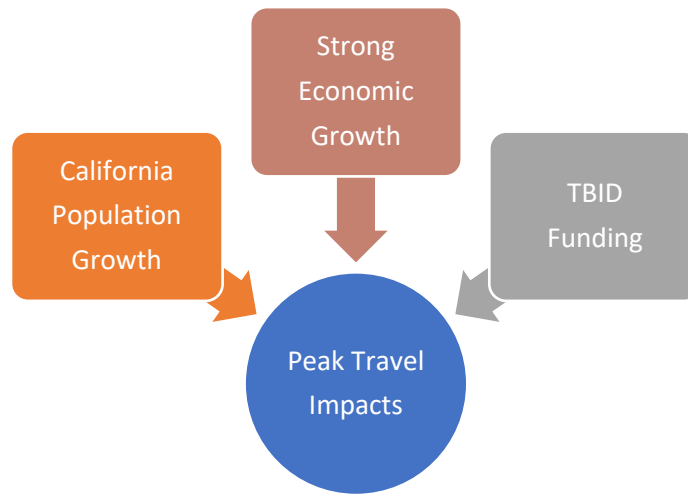
The California Market Has Changed

Destinations throughout California have experienced significant visitation levels, and the effect of this peak visitation is continuing to increase in terms of both volume and resulting impact. Traffic, crowding, and congestion have impacted local communities, and, in the process, tourism promotion has become a key concern. In some cases, these resulting impacts have become politicized in local communities. It is also unknown what the impact of peak visitation will be on visitors themselves. The key is for destinations like the Eastern Sierra to understand destination crowding's potential repercussions and identify ways to mitigate the impact on natural resources and the local communities' experiences. Understanding how these changes have impacted destinations and visitor travel perceptions, attitudes, and behaviors is critical for sustainability and future success.

B. The Situational Drivers

Considering the current peak-travel situation that the Eastern Sierra is now facing, it's essential to step back and understand the forces driving this change and impacting not just the Eastern Sierra, but also destinations throughout California. Our analysis identifies three core forces of change driving the current peak-travel situation. These include the population growth in the California market, the solid post-recession economy, and the growth of Tourism Business Improvement Districts (TBIDS) as a destination-marketing funding model.

Three Forces of Change Impacting Peak Travel



These three forces of change converging simultaneously have worked to produce a situation that tourism destinations have not seen before. To be sure, destinations have experienced traffic, crowding, and congestion at certain times during the year, but not for as long and as intensely as they are currently experiencing. Two of the forces, the California population and TBID funding, have been slowly growing for years. Catalyzed by a national and state economic boom, travel destinations are now experiencing peak numbers of visitors.

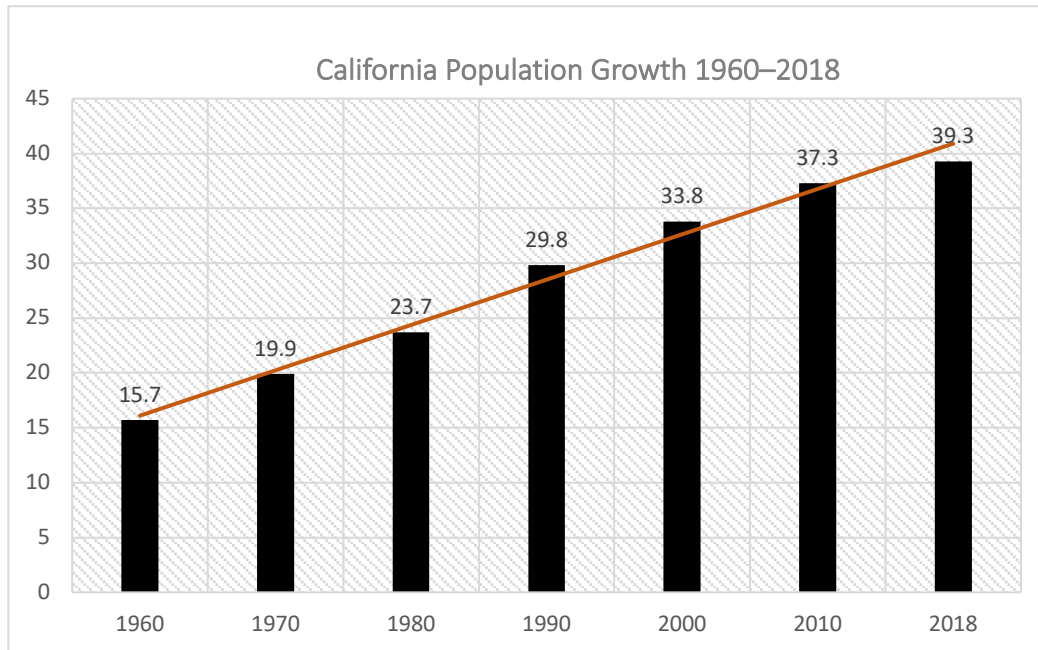
The Impact of COVID-19

In addition to these core situational drivers, 2020 saw the emergence of the COVID-19 pandemic, which dramatically changed visitation behavior throughout the state. While social distancing became a key mitigation measure, it had the unintended consequence of spiking visitor demand in outdoor locations away from dense urban populations. The Eastern Sierra received much of that visitation. As visitation to the Eastern Sierra increased, it attracted not only those who had visited previously, but also those who had never visited and were unfamiliar with guidelines and best practices for enjoying outdoor locations. The result was an increased impact on the natural resources, highlighting the increased need for visitor education. The COVID-19 pandemic offered a unique opportunity to reframe how Eastern Sierra destinations connect with visitors.

California Population Growth

One of the most impactful forces of change is the growth of the California population. This dynamic has two important elements: California's population has reached its highest yet, at 40 million, and the

population has concentrated in centers near and accessible to tourism destinations like the Eastern Sierra. The figure below illustrates California’s overall growth from 1960 and where it currently stands, at 39.3 million people.



Source: Statistica

California is a large state with a significant population and the fifth-largest economy in the world. Without corresponding increases in access capacity (roads, parking, etc.), the state’s overall growth has contributed to the traffic, congestion, and crowding at destinations.

California’s population has concentrated in four large Metropolitan Statistical Areas (MSAs):

Metropolitan Statistical Areas 2018 Population Estimates

Metropolitan Statistical Area	2018 Population
Bay Area: San Jose, San Francisco, Oakland	4,729,484
Greater Los Angeles: Los Angeles, Long Beach, Anaheim	18,788,800
Sacramento: Sacramento, Roseville, Arden, Arcade	2,482,660
San Diego: San Diego, Chula Vista, Carlsbad	3,095,313

Source: U.S. Census

These four regions account for approximately 72% of the California population. Los Angeles, in particular, has achieved “Mega City” status, with approximately 18.7 million people in the greater region. With all of this population growth concentrated in four regions, tremendous pressure is put on tourism destinations within a two-hour drive of these MSAs. California’s population is projected to grow to 44.1 million by 2030, just nine short years, and will continue to compound issues like crowding and access.¹

¹ Public Policy Institute of California

Strong Economic Growth

A second force impacting peak travel is the strong economy. A scant dozen years ago (2008), the country was mired in a recession that significantly impacted tourism. This situation has changed dramatically. The tourism industry's key economic indicators are Gross Domestic Product (GDP) growth, personal-income growth, low inflation, and low unemployment. When these indicators are positive, it creates an economic environment that is conducive to and enables travel.

Selected U.S. Economic Indicators (Year-Over-Year Change)

	2017	2018	2019
	% Δ	% Δ	% Δ
Gross Domestic Product (GDP)	2.2	2.9	2.3
Personal-Income Growth	4.4	4.5	4.2
Unemployment	4.4	3.9	3.6
Consumer Price Index (CPI)	2.1	2.4	2.9

Source: California Department of Finance

As can be seen, the indicators above reflect a powerful and robust U.S. economy. Strong GDP growth, which has exceeded 3% some quarters, coupled with solid personal-income growth, low inflation, and low unemployment, has the national economy in a robust position and has been reflected in the strong demand for tourism in California.

Tourism Funding

A third driving force impacting peak travel has been the dramatic increase in tourism promotion funding made available by the creation of Tourism Business Improvement Districts (TBIDs). According to Civitas, a key player in the formation of Tourism Business Improvement Districts, there are now 110 TBIDs in California generating approximately \$284 million in tourism promotion funds.



The effect of this cash infusion has been twofold: Destination Marketing Organizations (DMOs) promoting tourism have more available capital, and destinations that previously had no funding for tourism promotion now have available funding. This increase in tourism promotion has increased demand for visitation throughout California.

The infusion of marketing capital created a subtle but essential change in program accountability. With the collection of TBID funds through destination lodging properties, accountability shifted from more passive city councils and county supervisors, who in many cases were not equipped to judge the effectiveness of tourism programs, to a group (often boards of directors with hoteliers) with a keen understanding of marketing looking for clear evidence of a return on investment (ROI).

This subtle but significant change in funding enabled DMOs to find success advertising to regional feeder markets within a two- or three-hour drive of their destination. These markets had experienced significant California population growth and were enjoying a stable economy. This marketing focus had several important impacts: Not only did DMOs drive the number of visitors overall, but visitors tended to be weekenders and day-trippers rather than weeklong vacationers. Tourism increased significantly, to

the point that traffic on the way to, around, and on the way home from destinations increased dramatically. Residents in many destinations have protested the increase in weekend traffic. In some cases, DMOs have lost public-sector funding for promotional efforts as public priorities have shifted.

While additional elements contribute to peak travel, California's strong economy, population growth, and increased tourism marketing have played a significant role in the current situation.

The Impact on the Eastern Sierra

The Eastern Sierra is experiencing all-time-high visitation levels, and the impact of this peak visitation is predicted to increase.

The resulting traffic, crowding, and congestion have impacted local communities, leading them to voice concern about tourism promotion. Likewise, some visitors have expressed frustration with finding lodging and accessing recreation on public lands.

The region's success as an outdoor recreation market depends on its ability to mitigate the impact of crowding on natural resources and communities' experiences. Understanding how these changes have impacted destinations and visitor travel perceptions, attitudes, and behaviors is critical for the economic, environmental, and social sustainability of the region.

The impact on the Eastern Sierra can be summarized as follows:

- The Eastern Sierra has significant increases in visitation throughout the region and increasing demand for recreation in semi-densely populated and dispersed areas.
- As with increased visitation and demand for recreation activities, the Eastern Sierra has experienced impacts on the natural environment resulting in overall environmental degradation and diminished recreation experiences. Examples include increased trash, crowding, parking in off-limits locations, erosion, human waste, and wear and tear on the natural environment.
- Resident pushback regarding some visitor behavior, as well as access to areas that residents have primarily enjoyed in the past, has brought more political pressure on city and county government.
- With the short- and long-term prospects for continued population growth in the Eastern Sierra's feeder markets, and increasing demand for outdoor experiences and activities, the current tourism model may be unsustainable. To outline a program to support sustainable recreation-based tourism, the Visitor Connection Package frames a regional approach to connect with the visitor audience and educate them on stewardship in the Eastern Sierra.

Section 4: The Visitor Connection Strategy Overview

The Visitor Connection Strategy recognizes that visitation patterns in the Eastern Sierra have changed. There is a need to respond on a regional and collaborative basis.



1. Visitor Connection Strategy Assumptions

The strategy was developed with explicit assumptions, including:

- 1. The Eastern Sierra Visitor Connection Strategy will be based on the concept of sustainability and focused on educating visitors about the area and protecting the environment.***

The Visitor Connection Strategy considers residents' needs and the concept of sustainability, but primarily focuses on visitors.

- 2. Those developing and implementing the strategy will focus on long-term improvements in visitor engagement.***

Not enough can be stated about the importance of long-term vision. The Visitor Connection Strategy is developed with a view to the long term and guides in the near term for both the public- and private-sector partners. While it is important to implement short-term tactical programs, efforts that focus solely on the short term become reactive and lose sight of the long-term strategies designed to bring about positive changes by visitors engaging in the natural environment.

3. *The Strategy will be developed by organizations implementing the Package.*

This assumption is essential, particularly in the diverse Eastern Sierra region, where all organizations are critical in implementing the Visitor Connection Strategy. The Visitor Connection Strategy partner organizations, made up of 28 representatives of regional organizations including DMOs and recreation user groups, worked collaboratively to develop an impactful and sustainable message for the Eastern Sierra's audience and environment.

2. Visitor Connection Strategy Framework

The visitor connection framework consists of three elements: understanding the current opportunity, creating a strategy, and transforming the created strategy into implementation steps leading to on-the-ground achievements.



During eight workshops, participants from Eastern Sierra partner organizations worked through each step to develop the complete Visitor Connection Package.

3. Guiding Principles

The following guiding principles were developed for the Visitor Connection Program:

GUIDING PRINCIPLES

THE VISITOR CONNECTION PROGRAM SHOULD:

- ★ Focus on stewardship education and the celebration of local culture.
- ★ Be reliable, implementable, and forward thinking.
- ★ Utilize informed and collaborative decision-making.
- ★ Employ a phased approach to develop tools and capacity.
- ★ Leverage existing communication assets to engage visitors throughout their "sequence of encounter."
- ★ Not compete with existing efforts in the region.

Section 5: The Visitor Connection Strategy Plan

Part 1: Understanding

1.1 The Problem/Opportunity Statement

The first step in developing the Visitor Connection Strategy was to understand the challenges and opportunities facing outdoor recreation in the Eastern Sierra. Peak tourism in the Eastern Sierra has added strain to natural resources, public access, land management, and community relations. Visitors find it difficult to navigate complex land-management jurisdictions when planning where to go and stay. Continuously changing campground and trail closures related to wildfires and COVID-19 have compounded the confusion.

OPPORTUNITY STATEMENT

By working together as a network of regional organizations, we strive to leverage sought-after recreation experiences in the Eastern Sierra and emotional connections to the region for the purpose of preparing and educating both visitors and residents to embody a respectful mindset, promote visitor dispersion, and motivate stewardship behaviors, directly contributing to the sustainability of natural resources and gateway communities.

Source: Connection to the Eastern Sierra Visitor Audience, Meeting 4

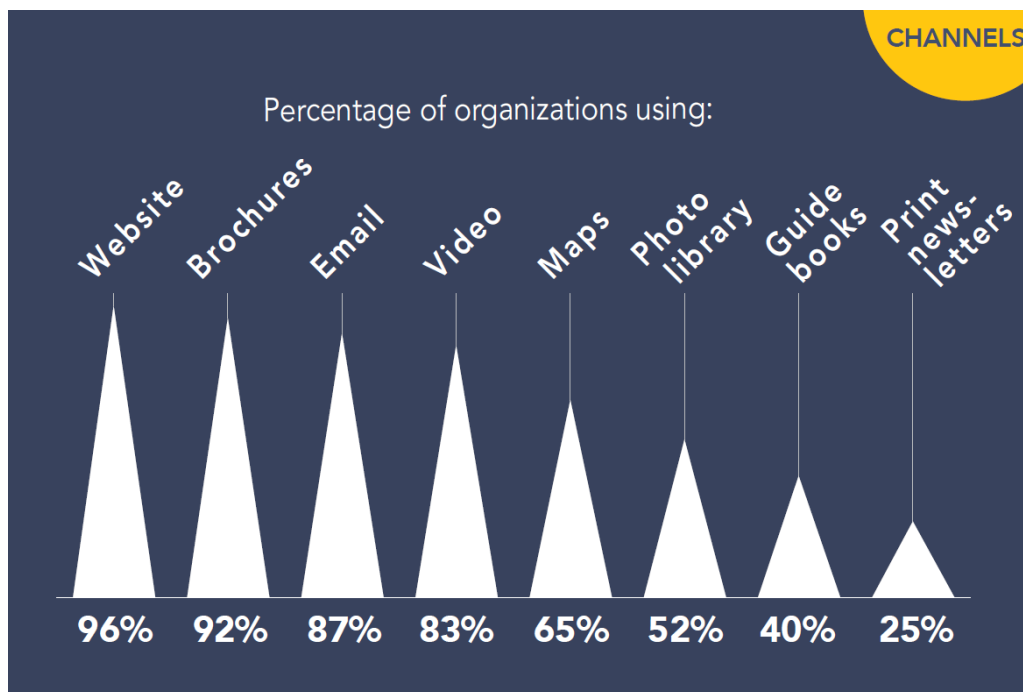
It should be noted that three of the identified opportunities are focused on visitors, including changing visitor mindsets, educating visitors, and creating sustainability with visitors and the natural environment. The fourth opportunity is focused on the working partnership and collaboration among partners. The problems and opportunities serve as a basis for developing and guiding the Visitor Connection Strategy.

1.2 Regional Organization Outreach and Communication Asset Review

An integral part of the Visitor Connection Strategy is leveraging the supporting partner organizations' communication assets to benefit the partnership's reach in providing transparent and consistent stewardship messaging. Partner organizations have a combined audience reach of:

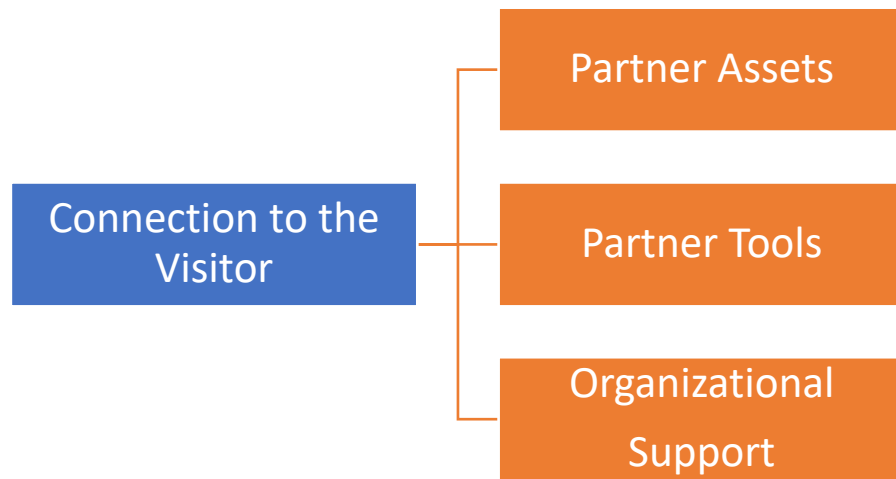
- 8 million direct in-person interactions with the public per year
- 31 million webpage views per year
- 1.2 million Facebook followers
- 650,000 Instagram followers
- 194,000 Twitter followers
- 54,000 Pinterest followers
- 637,000 email newsletter subscribers
- 34,000 print newsletter subscribers

The combined partnership organizations reach their audiences with various marketing tools. About 63% of partners currently use their messaging and special events to promote stewardship.



Source: Connection to the Eastern Sierra Visitor Audience, Meeting 7

The partnership has a robust opportunity for visitor messaging with the combined impact of all of its communication elements, including partner assets, partner tools, and organizational support. These combined elements create an opportunity to leverage all of these individual efforts into a cohesive and focused approach to connect with the visitor audience.

Partner Assets/Tools Communication Model

Source: SMG Consulting

The model consists of three elements:

1. Existing partner assets include large audiences of potential and actual visitors.
2. Individual partner tools can distribute stewardship messaging developed by the partnership.
3. Organizational support provides two key elements: new ideas and innovations in messaging and long-term commitment to the programs.

This model leverages existing assets and tools of individual partners to promote a focused message for the region. The needed messaging can be spread only through the collective action of the partners; no one partner can be as effective as the whole group.

Part 2: Creating

2.1 The Eastern Sierra Visitor Persona

The target market is focused not on the demographics of visitors, but rather on a visitor persona.

“Personas...represent a user type that might use your service, product, site, or brand similarly—creating personas assists in understanding potential users’ needs, experiences, behaviors, and goals.

“Creating personas helps recognize that different people have different needs and expectations and identify with the Eastern Sierra user the Visitor Connection Package is being developed for. The following persona is designed to guide the strategy’s ideation processes, and they can help the Eastern Sierra to achieve the goal of creating [an] effective stewardship messaging program.”²

PERSONA: THE EASTERN SIERRA VISITOR

This person is motivated by the enjoyment and experience of time spent outside, regardless of whether they are exploring for the first time or going the distance to be distanced.

This visitor balances their personal ways of connecting to the outdoors with community- or family-oriented activities. This includes a wide variety of outdoor activities and ways of accessing them.

They seek out beautiful and unique natural resources throughout the region.

This visitor sees the Eastern Sierra as a special place where they seek connection to the land, family, friends, ancestors, history, tradition, or themselves. The importance of these experiences compels them to leave their regular environment and spend their time, energy, and money in this pursuit.

While this person looks for connection in ways that are specific to them, they may or may not be aware of the complex history of the region or the realities and experiences of other visitors and local residents.

They expect to be able to re-create their positive experiences in the Eastern Sierra, and that the Eastern Sierra will always be here for them.

Source: Connection to the Eastern Sierra Visitor Audience, Meeting 7

² Sang 2021

2.2 Eastern Sierra Messaging Objectives

The Eastern Sierra messaging objectives are designed to maximize the opportunities that have been identified previously. They include the following:

1. Support organizations' existing stewardship messages.
2. Leverage the power of Eastern Sierra marketing channels.
3. Leverage the financial resources of the Eastern Sierra for message reach.
4. Create awareness for the Eastern Sierra stewardship message.
5. Educate potential visitors on stewardship practices.
6. Measure the effectiveness of messaging efforts.

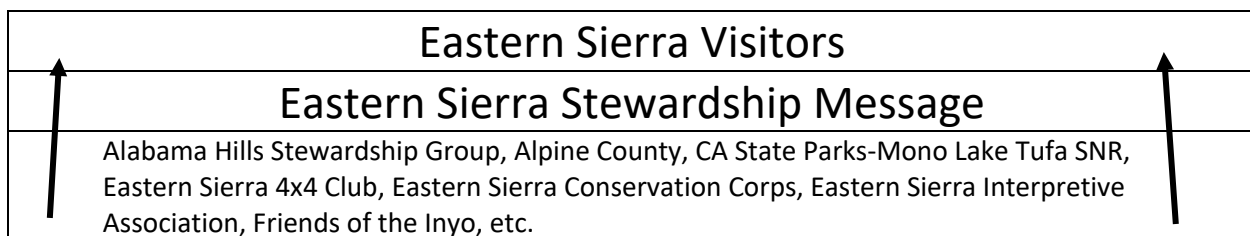
2.3 The Messaging Strategy

The messaging strategy comprises two elements: a micro model and a macro model. The micro model uses the partnership's existing tools to reach potential visitors, and the macro model can be used to support partner message outreach and create a unified message and resource for the region. The purpose of the macro model is to support the partner organizations and not compete with them.

A. Micro Model

The micro model takes advantage of partner organizations' existing communication tools (previously identified) and leverages those resources with Eastern Sierra message content. The macro model will develop appropriate messages and tools and make them available to the partners for inclusion in their existing efforts.

Micro Model



Source: SMG Consulting

B. Macro Model

Focus on Driving the Website and Influencing Potential Visitors

Given the prominent role that the internet plays in travel planning, the Eastern Sierra's communication efforts should drive potential visitors to a regional website to be developed under the Visitor Connection Package.

At the core of the website strategy are two basic principles:

- The best organizations to connect with the visitor are individual partner organizations that are closest to the visitor. They can connect and present a stewardship message.
- An organization to create tools to make available to the partners would need to be developed. The formation of this organization is a recommendation of this strategy.

How the strategy works (see the model on the following page):

- Communications programs (advertising, SEO, social media, public relations) drive visitors to an Eastern Sierra regionwide portal website.
- Once visitors go to the Eastern Sierra portal website, they will be presented with a range of stewardship information relevant to the region and their trip, as well as an opportunity to connect with any of the partner websites. It is important to reach the potential visitor early in their travel-planning journey with targeted stewardship messaging because they may not return to the portal website.
- A potential visitor may decide to visit as a day or overnight visitor. Based upon their experience, new visitors either do or do not become repeat visitors. They may not come back to the portal site and are likely to go to a DMO website, a lodging website, an attraction website, a land-manger website, or other websites, going back to the lodging property/attraction directly or back to the website to choose another lodging property or attraction, or they may fall out of the entire system.

Eastern Sierra Stewardship Messaging Strategy



Source: SMG Consulting

2.4 Messaging Themes

In developing stewardship messaging, it is essential to be authentic and transparent and tell the Eastern Sierra's story and its importance for future generations. To that end, the following message themes and photos have been selected to guide future messaging created for the Eastern Sierra.

A. Eastern Sierra Themes

As identified in the Visitor Connection Package, “These themes will provide a strong foundation for the development of sustainable-recreation messaging campaigns to connect with the Eastern Sierra visitor audience using an authentic and unified regional voice.” The themes represent four defining pillars of the Eastern Sierra that residents have and help define a sense of place. They were developed and discussed by the working group.

Eastern Sierra Themes



Source: Connection to the Eastern Sierra Visitor Audience, Meeting 7

Sense of Place

“In general, sense of place describes our relationship with places, expressed in various dimensions of human life: emotions, biographies, imagination, stories, and personal experiences (Basso, 1996). In environmental psychology, the sense of place—how we perceive a place— includes place attachment and place meaning (Kudryavtsev, Stedman, and Krasny, 2012).

“Place attachment reflects a bond between people and places, and place meaning reflects symbolic meanings people ascribe to places. In short, ‘sense of place is the lens through which people experience

and make meaning of their experiences in and with the place' (Adams, 2013). Sense of place varies among people, in history, and throughout one's lifetime (<http://www.placeness.com>).

"People may attribute various meanings to the same place in relation to its ecological, social, economic, cultural, aesthetic, historical, or other aspects. Sense of place evolves through personal experiences, and defines how people view, interpret, and interact with their world (Russ et al., 2015)."

B. Visualizing the Eastern Sierra

As part of messaging, visualizing the Eastern Sierra helps capture the Eastern Sierra's feel as a place. The group members selected these photos to capture the Eastern Sierra's sense of place.

ALIGNING IMAGES WITH THEMES

RESPECT - APPRECIATION - STEWARDSHIP



ESCAPE - ADVENTURE - SURPRISE



MEMORY - TRADITION - CONNECTION



EXPANSIVE - DRAMATIC - TIMELESS



Eastern Sierra | Visitor Connection Package
Framing a Regional Message Pg 17

See Appendix for image credits

Part 3: Transforming

In this phase, we focus on transforming and implementing the Visitor Connection Strategy for the Eastern Sierra. This includes tools and related action steps for implementation, and organization to provide the necessary infrastructure to implement the Visitor Connection Strategy.

A. Tools and Action Steps

Phase 1



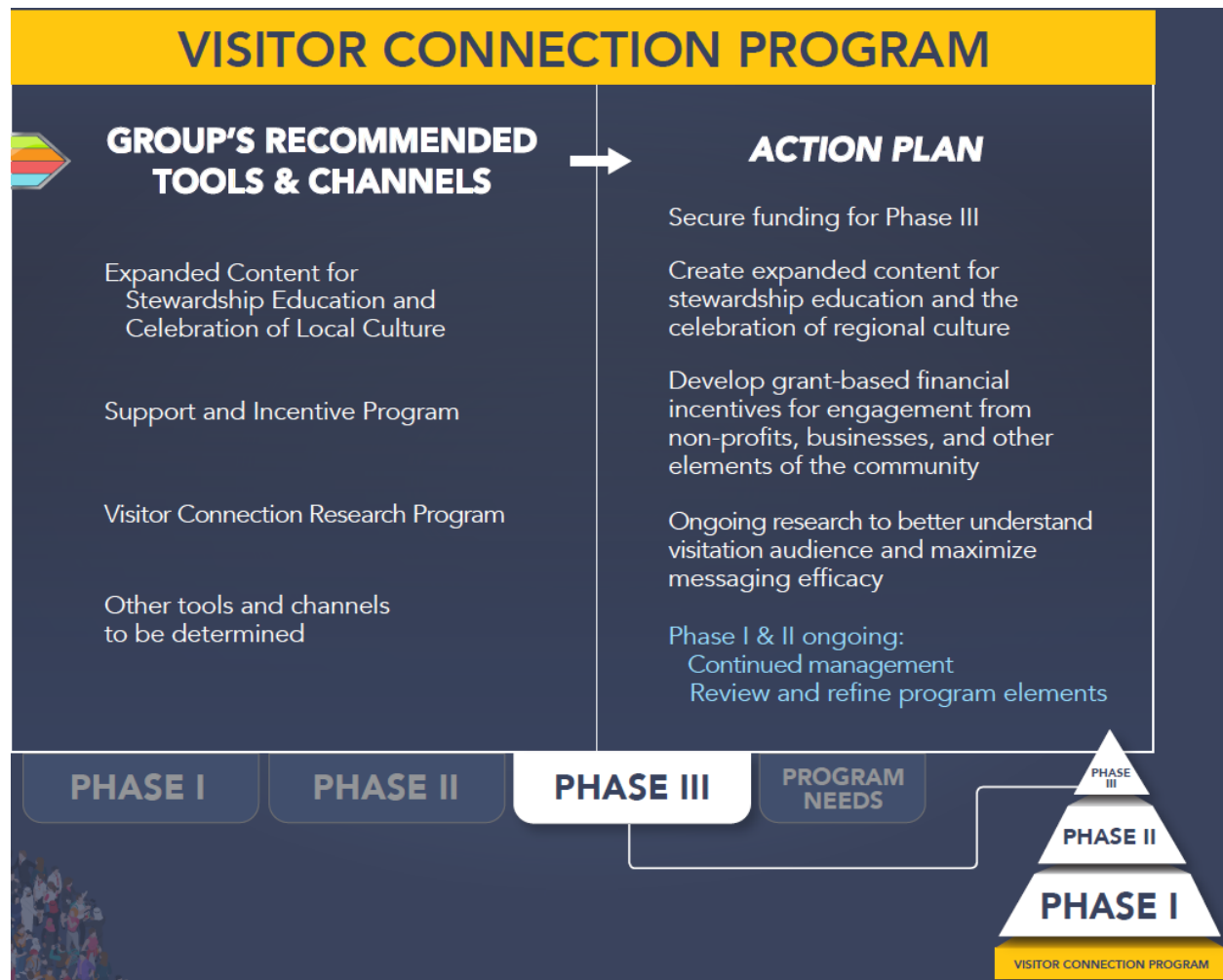
Source: Connection to the Eastern Sierra Visitor Audience, Meeting 7

Phase 2



Source: Connection to the Eastern Sierra Visitor Audience, Meeting 7

Phase 3



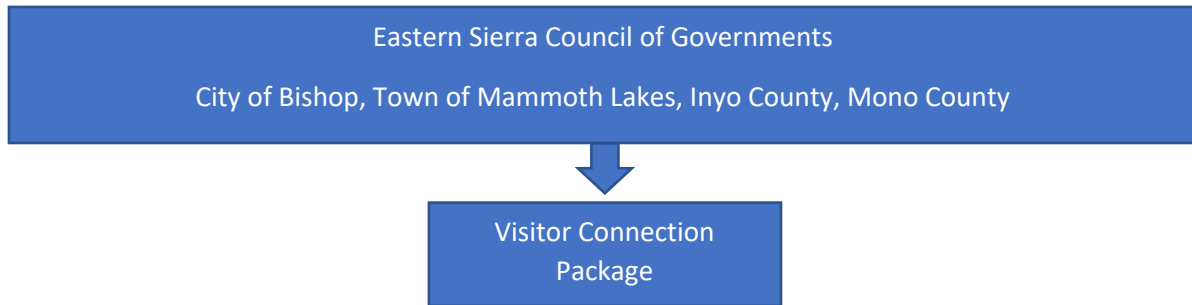
Source: Connection to the Eastern Sierra Visitor Audience, Meeting 7

B. Organizational Structure

The organizational structure includes two essential elements: where the Visitor Connection Package fits in the mix of regional organizations, and how the effort will be organized to operate and implement programs.

1. Regional Fit

In finding a place where this effort fits regionally, it is essential to consider which organization can most effectively host and/or manage the Visitor Connection Package and which organizational structure has the capacity to acquire grant funding and provide accountability. The most likely fit would be within the Eastern Sierra Council of Governments (ESCOG), given the regional nature of the Visitor Connection Package. The ESCOG is a joint powers authority that includes the City of Bishop, the Town of Mammoth Lakes, Inyo County, and Mono County. The ESCOG has the authority to apply for and administer grant funding and execute programming about sustainable recreation, like the Visitor Connection Package.



2. Visitor Connection Package Organization

It is critical to develop the necessary organizational structure to carry out the Visitor Connection Package's programs and meet the region's needs.

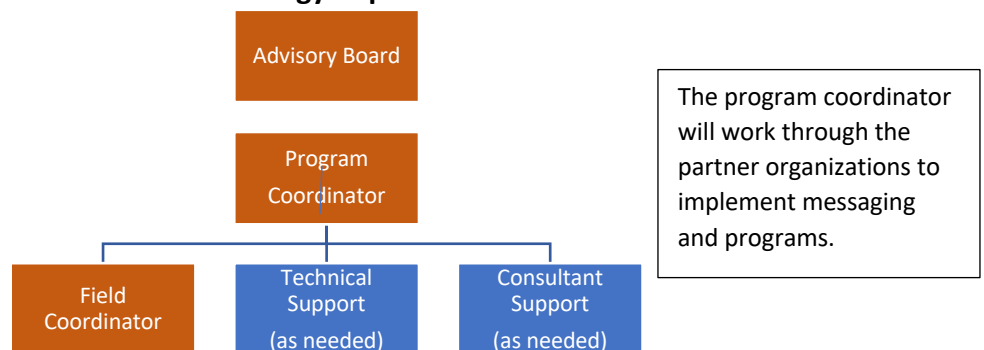
Membership

- The Visitor Connection Package will need to determine if the organization tasked with developing the macro strategy is member-based or open to all. Will there be a cost to be involved? What are the inclusion criteria?

Operating Structure

- Advisory board: An advisory committee will oversee the strategy's management and implementation. (Membership on that committee will need to be determined.)
- Partner community organizations: The effort will need to identify a comprehensive list of organizations that can help inform and implement the program.
- Management of the Visitor Connection Strategy: The organization will need operational structure to drive implementation.

Visitor Connection Strategy Implementation Structure



The goal is not to create an organization that duplicates efforts among existing private- and public-sector organizations, but instead to leverage the efforts that already exist and to coordinate new

initiatives the members develop. As such, the organization can be managed at least on a starting basis with a part-time program coordinator who provides day-to-day management that reports to the Advisory Board, and a part-time field-support person who would work directly with partner organizations in implementing programs. The core staff could be supplemented when needed with appropriate consultants and technical-support staff.

The success of the organization is based on the following:

1. The organization must focus on doing for the region what each individual organization cannot do on its own. That is to say, the organization must stay focused on leveraging existing member efforts and coordinating new member initiatives. It is important to resist duplication of efforts. The three phases outlined above will form the basis for the organization's progress.
2. The organization must be as lean as possible so funding supporters know that maximum dollars are going toward the program objectives, building confidence in and sustainable support for the organization.
3. The organization must have defined and measurable goals that support the organization's objectives. Long-term funding will be incumbent on meeting the objectives.

Funding

There is a need to develop a phased budget for implementation with commitments from the membership to a sustained funding level to execute the strategy. The funding model calls for a tiered approach to allow partners to support the effort with different levels of funding. The funding model below is presented as a conceptual model of how different levels of funding and the number of participants can be adjusted based on the funding amount needed and the number of participants. For example, an approximate \$100,000 operating budget could be developed in the following way. Funding partners will benefit from turnkey content and regional information resources.

Potential Funding Model (Conceptual Only)

<p>The funding model is based on three variables: the amount needed, the potential number of funding sources, and the number of tiers needed to accommodate the type of funders available.</p>	<p>Membership Funding Level</p> <p>100 Members @ \$75</p>	<p>Amount</p> <p>\$7,500</p>
	<p>Third Funding Level</p> <p>30 Funders @ \$200</p>	<p>\$6,000</p>
	<p>Second Funding Level</p> <p>5 Funders @ \$5,000</p>	<p>\$25,000</p>
	<p>Base Funding Level</p> <p>3 Funders @ \$20,000</p>	<p>\$60,000</p>
		<p>\$98,500</p>

In addition to the funding model above, the organization can supplement its budget with other sources of funding:

- Grants: The organization should identify appropriate grants for specific projects.
- Specific project underwriting: Depending upon the project, there may be specific funding available from corporate and government sponsors. This might include unique research projects, exhibitions, panel discussions, etc.
- Annual fundraiser: Develop an annual fundraiser that celebrates the Eastern Sierra's culture and communities.
- Retail sales: Sell low-risk retail products, such as Eastern Sierra stickers and a photo series.

Conclusion

The Visitor Connection Strategy is a unique opportunity to address a significant challenge in the Eastern Sierra by working cooperatively to leverage the assets of a variety of organizations in three different counties. Over the long term, this effort can also serve as a blueprint for other issues that may arise. To not fully engage and address the identified issues would be a missed opportunity for the region.

Appendix

Appendix 1: Photo Credits

Kneeling: Shmuel Thaler/*Santa Cruz Sentinel*

Trail work: Friends of the Inyo

Black-and-white bristlecone: Sean Bagshaw, outdoorexposurephoto.com

Jumping person: Connie Terry

Ice swimming: Christian Pondella, christianpondella.com

Night sky: Michael Ver Sprill, dreamstime.com

Adaptive outing: Chelsea Taylor

Fishing: Town of Mammoth Lakes

Native American baskets: *Nevada Magazine*

Dust storm: Great Basin Unified Air Pollution Control District

Organized historic artifacts: NPS photo/Tom Alex

Bristlecone sunset: Neutronman, dreamstime.com



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